



DESIGNATION OF BENEFICIARY FORM

- Use this form to designate your beneficiaries.
- Please complete each section for each employer plan account. Please print legibly in blue or black ink.

1 Participant Information	<div style="display: flex; justify-content: space-between;"> <div> 401 Plan Number <u>106546</u> 457 Plan Number <u>306310</u> Social Security Number _____-_____-_____ Full Name of Participant <div style="display: flex; justify-content: space-between;"> Last _____ First _____ M.I. _____ </div> </div> <div> Employer Plan Name <u>Loudoun County, VA</u> Daytime Phone Number (____) - ____ - _____ Home Phone Number (____) - ____ - _____ Marital Status <div style="display: flex; justify-content: space-around;"> <input type="checkbox"/> Married <input type="checkbox"/> Single </div> </div> </div>																																																							
2 Beneficiary Designation	<p>Your designation of beneficiary(ies) tells us who should receive the accumulated value of your account if your death should occur before completing the distribution of your account. If no primary beneficiary(ies) lives longer than you, benefits will be paid to your contingent beneficiary(ies). If none of your primary or contingent beneficiaries are living at the time of your death, the proceeds will be paid to your estate. If this form is not signed, the beneficiary(ies) designation you select will not be valid. If a valid form is not filed, benefits will be paid to your estate at the time of your death.</p> <p>PLEASE NOTE: If a Social Security number is not provided and ICMA-RC cannot locate the named beneficiary, the account balance will be paid to your estate.</p>																																																							
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4 Spousal Signature 401(a) Only	<p>I understand that by signing this form I am waiving my right to be named as the primary beneficiary of my spouse's 401(a) Account.</p> <div style="display: flex; justify-content: space-between;"> <div> Spouse's Signature _____ </div> <div> Date _____ </div> </div>																																																							

IMPORTANT BENEFICIARY INFORMATION

To ensure that any assets you have remaining in your account at your death are distributed according to your wishes, it is important that you provide as much information as possible about each of your beneficiaries. If we cannot locate your beneficiaries upon your death, your assets will be disbursed to your estate.

The IRS has certain rules governing disbursement of funds to beneficiaries. For example, some plans require that a spouse be named primary beneficiary unless he/she waives his/her rights. These rules are outlined in your employer's plan and in ICMA-RC's Participant and Beneficiary Withdrawal Packets. Please be sure to review this information thoroughly before designating beneficiaries on this form.

Beneficiary percentages are deemed invalid if your request omits percentages or includes percentages that do not equal 100% or were expressed with fractions. Please use only whole percentages.

2a. 401(a) DESIGNATION OF BENEFICIARY

Use this section to designate your beneficiary(ies). If this form is not signed, the beneficiary(ies) you selected will not be valid. If a valid form is not on file at the time of your death, benefits will be paid as outlined in your employer's plan document. PLEASE NOTE: If a Social Security number is not provided and ICMA-RC cannot locate the named beneficiary, the account balance will be paid to your estate.

Beneficiary Designation - SINGLE PARTICIPANTS

Your designation of beneficiary(ies) tells us who should receive the accumulated value of your account if you die before the full distribution of your account. If no primary beneficiary(ies) lives longer than you, the benefits will be paid to your contingent beneficiary(ies). If none of your primary or contingent beneficiaries are living at the time of your death, the proceeds will be paid as outlined in your employer's plan document.

Beneficiary Designation - MARRIED PARTICIPANTS

You may name your spouse as beneficiary for up to 100 percent of your account. You may also waive naming your spouse as beneficiary for any part of your account and then name someone else as beneficiary. However, if you waive naming your spouse as beneficiary, your spouse must consent to this waiver.

Your employer's plan may require that your spouse be the beneficiary for at least 50 percent or more of your account. If this is the case, the waiver and consent rules mentioned above still apply.

If you are unsure which provision applies to you, check with your employer or ICMA-RC's Investor Services at 800-669-7400.

2b. 457 DESIGNATION OF BENEFICIARY

Primary Beneficiary(ies)

You may designate one or more persons to receive your assets upon your death. Be sure to use only whole percentages.

Contingent Beneficiary(ies)

If none of your primary beneficiaries are living upon your death, your assets will be distributed to your contingent beneficiary(ies). You may specify one or several persons. Be sure to use only whole percentages.

If there is not enough space to add your beneficiaries, you may attach a separate sheet if necessary. Please check the appropriate box to indicate which type(s) of beneficiary you are changing, and write "see attached sheet" in the box(es) under "Name of Beneficiary".

Note: If a Social Security Number is not provided for beneficiaries, and/or ICMA-RC cannot locate the named beneficiaries, the account balance will be paid to your estate.

SPECIAL CERTIFICATION FOR PARTICIPANTS IN COMMUNITY PROPERTY STATES

If you are married and live in a Community Property state, you must generally name your spouse as your beneficiary, unless your spouse waives this right. ICMA-RC cannot be responsible for an employee's failure to properly designate a beneficiary in accordance with state law requirements and the employee's failure to provide the certification required by this enrollment process. Please be advised that failure to meet state law requirements with respect to your beneficiary designation may result in your beneficiary designation being invalid, and the payment of benefits to someone other than your designated beneficiary. If you choose to name a beneficiary that is not your spouse, you and your spouse will need to complete the *Community Property Spousal Waiver Form*. Contact 1-800-669-7400 for more information and to request the waiver form.